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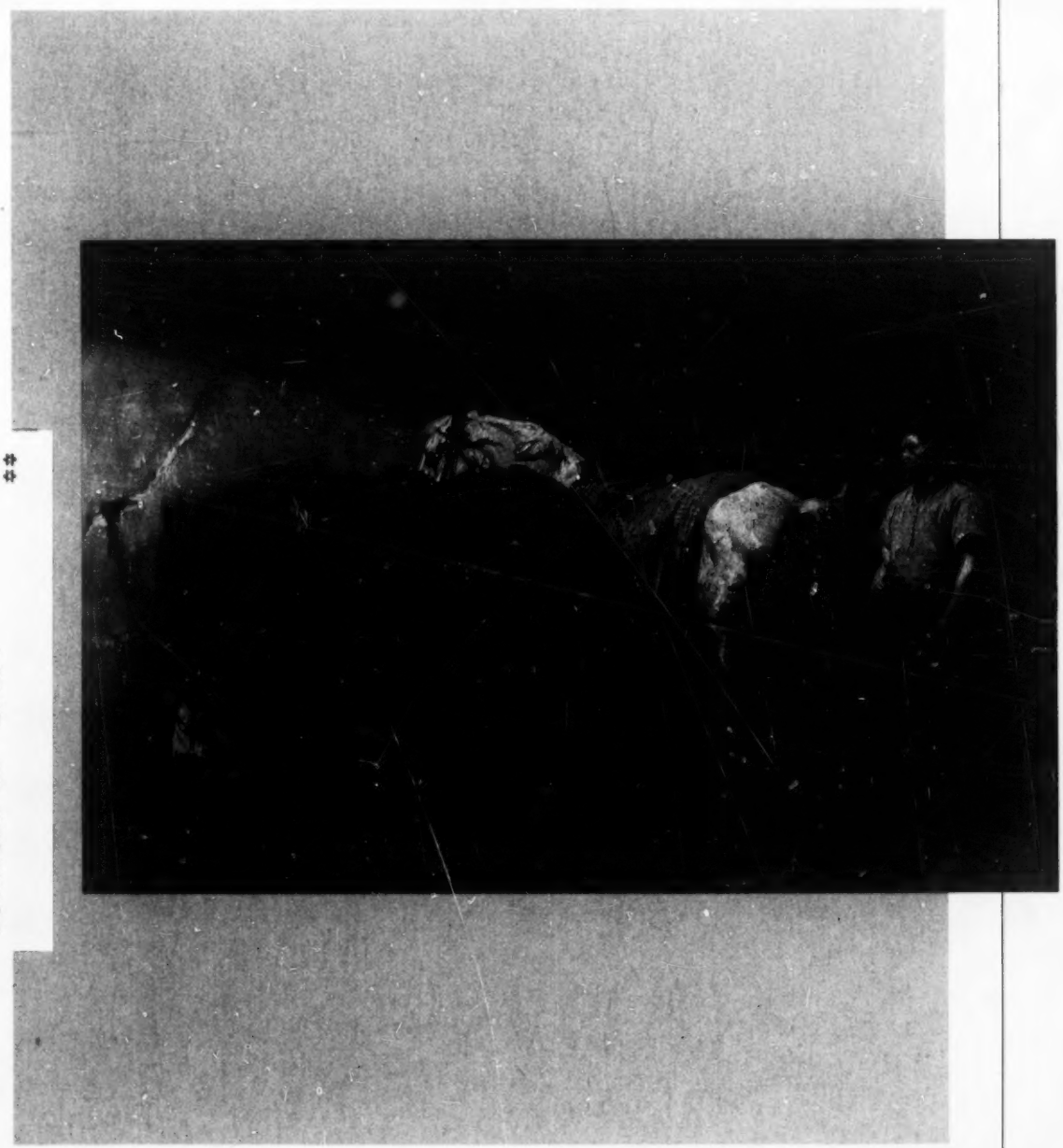

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Letters

Hemorrhagic colitis and hemolytic uremic syndrome caused by *Escherichia coli* in people consuming undercooked beef and unpasteurized milk 1360
Clearinghouse for veterinarians wishing to work in developing countries 1361
Flying syringes 1361

Veterinary Services Market for Companion Animals

Horse owners and their use of veterinary services—*C. Michael Troutman* 1362

News

What to Expect Now That Congress Has Created a Veterinary Rx Drug Category 1365
AABP Members Stampede to Calgary 1367
Donating Professional Services: A Matter of Conscience or Ethics? 1372
APHIS Biologics Staff Describes Licensing Process at COBTA Meeting 1374
Certification Examinations 1379
State Board Examinations 1380
Deaths 1380

Reflections . . .

What's past is prologue—*J. Fred Smithcors* ... 1382

Special Commentary

Admissibility of computerized medical records as evidence in a court of law—*Michael F. Philbrick and James F. Wilson* 1386

Insurance Note

Types of professional liability insurance—*Eileen DiFrancesca* 1391

Legal Brief

Malpractice suits and malicious prosecution—veterinarian countersuits—*Harold W. Hannah* 1392

Zoonosis Update

Dog and cat bites—*John R. August* 1394

ECG of the Month

Valerie Fucci 1400

Interpretive Summaries of Articles in This Issue 1402

Reports of Original Studies

Epidural injection of xylazine for perineal analgesia in horses—*P. H. LeBlanc, J. P. Caron, J. S. Patterson, M. Brown, and M. A. Matta* 1405

Diarrhea associated with sand in the gastrointestinal tract of horses—*J. J. Bertone, J. L. Traub-Dargatz, R. W. Wrigley, D. G. Bennett, and R. J. Williams* 1409

Clinical Reports

Cryptosporidiosis in veterinary students—*Jay F. Levine, Michael G. Levy, Richard L. Walker, and Susan Crittenden* 1413

Fatal transesophageal carotid arterial perforation by thorns in a calf—*A. David Weaver and Thomas P. Brown* 1415

Hemoperitoneum caused by rupture of a juvenile granulosa cell tumor in an equine neonate—*S. L. Green, T. E. Specht, S. C. Dowling, A. J. Nixon, J. H. Wilson, and J. B. Carrick* 1417

Hereditary junctional mechanobullous disease in a foal—*Steven R. Frame, Daniel D. Harrington, John Fessler, and Peggy F. Frame* ... 1420

Clinical and clinicopathologic findings in two foals infected with *Bacillus piliformis*—*Kent A. Humber, Raymond W. Sweeney, Judith E. Saik, Thomas O. Hansen, and Charles F. Morris* 1425

Disseminated hemangiosarcoma in a horse—*Jenny E. Johnson, Jill Beech, and Judith E. Saik* 1429

Response to radiation therapy of recurrent lymphangioma in a dog—*Jane M. Turrel, Linda J. Lowenstine, and Larry D. Cowgill* 1432

Intraspinal epidermoid cyst in a dog—*James Tomlinson, Robert J. Higgins, Richard A. LeConteur, and David Knapp* 1435

Paraesophageal hiatal hernia and pyloric obstruction in a dog—*Kristina G. Miles, Eric R. Pope, and Albert E. Jergens* 1437

Treatment of hemangiopericytoma in a dog, using surgical excision, radiation, and a thoracic pedicle skin graft—*Theresa W. Fossum, C. Guillermo Couto, William D. DeHoff, and Daniel D. Smeak* 1440

Reports of Retrospective Studies

Disseminated histoplasmosis in dogs: 12 cases (1981-1986)—*Kenneth D. Clinkenbeard, Rick L. Cowell, and Ronald D. Tyler* 1443

Generalized peritonitis in dogs: 50 cases (1975-1986)—*Giselle Hosgood and S. Kathleen Salisbury* 1448

What Is Your Diagnosis?

Beth Paugh Partington 1451

Book Reviews

Introduction to Veterinary Pathology 1412
Canine and Feline Cardiology 1428
Nutrient Requirements of Swine 1434

Abstracts of Selected Reports

Pathogenesis of blue fox parvovirus on blue fox kits and pregnant vixens 1424
Use of pulsatile intravenous administration of gonadotropin-releasing hormone to induce fertile estrus in bitches 1431
Enhancement of infectious bovine keratoconjunctivitis by modified-live infectious bovine rhinotracheitis virus vaccine 1442

Announcements

Coming Meetings 1453
Foreign Meetings 1455
Applications for Membership 1455
Educational Opportunities 1456

Classified Ads 1461

About the cover

"Passion and Patience" was painted in 1833 by English artist, John Sargent Noble (1848-1896). Noble was a student of Sir Edwin Landseer, England's most admired 19th-century animal painter. Noble's most frequent subjects were hunting dogs, often in Highland settings, otter hounds, and otter hunting. He began exhibiting at the Royal Academy in 1871, and thereafter until 1895, a year before his death.

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BPA

Veterinary Services Market for Companion Animals

Horse owners and their use of veterinary services

This is the fourth article in the series that summarizes the AVMA's report on the veterinary services market. Findings regarding horse ownership by US households are presented in this article. Additionally, horse owners' use of and expenditures for veterinary services are discussed.

Horse ownership statistics

Of the 29,535 nationally representative households surveyed, 2.8% (834) indicated that they owned horses at the end of 1987. When this percentage is projected to the total population of US households, the estimated number of horse-owning households at the end of the year was 2.6 million.

The mean number of horses owned per household was 2.6. Further, 8.1% of horse-owning households owned their horses in partnership with others. Since they did not fully own their horses, the average number of horses owned per household was adjusted accordingly.

Given the estimated number of horse-owning households and the mean number of horses per household, the projected population of horses was 6.6 million. However, this estimate does not reflect all horses in the United States. Horses owned by commercial operations and other organizations would not be addressed in a survey of US households. Therefore, the estimate of 6.6 million only represents a portion of the total US horse population.

On a regional basis, horse ownership was highest in the West, where 3.7% of households owned a horse. The West was followed closely by the South, with 3.2% of households reporting horse ownership. In comparison, the North Central and Northeast regions had 2.8% and 1.5% of households owning horses, respectively.

The most common age bracket for horses was 2 to 5 years (33% of horses owned), 28% were >10 years old, 27% were in the 6- to 10-year bracket, and 13% were <2 years old.

Horse owners were likely to own another species of companion animal. Three-fourths of horse owners owned a dog, and two-thirds owned a cat.

From a demographic standpoint, horse owners tend to be families with children. Among all US households, for instance, families with children represent 43% of households. Among horse-owning households, however, 63% were families with children. Another important demographic characteristic of horse-owning households is the location of residence. A disproportionately high percentage of horse owners live in small cities. The percentage of horse owners living in areas with a population <50,000 was 60%. In contrast, the percentage of all US households in these areas is only 28%.

Table 1—Statistics of horse ownership by US households in 1983 and 1987

	1983	1987
Percentage of households owning horses	2.8	2.8
Estimated number of US households (millions)	2.4	2.6
Mean number of horses owned per household (millions)*	3.0	2.6
Estimated horse population (millions)	7.0	6.6

*The mean number of horses owned in 1983 was not adjusted for shared ownership of horses. If the adjustment had not been made with the present survey data, the estimated horse population at the end of 1987 would have been 6.8 million.

Trends in horse ownership

A similar study was conducted for AVMA in 1983, and the estimated number of horses owned by US households was 7 million, according to that research (Table 1).[1] On the basis of the present study, there has been a slight decline in horses owned by households. The main factor in this decrease from 7 million to 6.6 million is the average number of horses owned per household (3.0 vs 2.6).

The estimated horse population is considerably higher than the estimated 1985 horse population (5.3 million) given by the American Horse Council.[2] That estimate included horses owned by US households, as well as those owned by commercial establishments and organizations. However, the survey methods used in the American Horse Council study was oriented toward horse enthusiasts who

Prepared by C. Michael Troutman, PhD, Charles, Charles Research Group, Overland Park, Kan. Fourth in a series of 5 synopses from the entire report, which became available Sept 15 (see JAVMA, Oct 1, 1988, p 765).

subscribed to selected horse magazines, belonged to national horse clubs, and owned a horse of a registered breed. Such methods would underestimate the horse population because some horse owners might not subscribe to the specific horse magazines or belong to selected horse clubs.

Use of veterinary services

The percentage of owners who obtained veterinary care was 47.4%. Horse owners had their horses examined or treated by a veterinarian an average of 1.85 times. Since the average number of horses owned at any time during 1987 was 2.84 horses per household, the average number of veterinary visits per horse owned was 0.7 (1.85 ÷ 2.84).

Horse-owner expenditures for veterinary services and products were estimated by analyzing a selected group of owners who had a horse examined by a veterinarian. Although some of these owners had dogs and/or cats, they did not report any veterinary visits for their dogs or cats. Therefore, almost all of their expenditures would have been for equine veterinary care.

The mean cost per visit among this group of horse owners was $65.27. Since the average number of equine veterinary visits per horse-owning household was 1.85, the estimated expenditures per household would have been $120.75 (1.85 × $65.27). During 1987, about 3% of US households owned a horse, and projecting the average expenditure per household to all horse-owning households gives an estimated total expenditure for equine care of $329.8 million in 1987.

Over half of horse-owning households did not obtain equine veterinary care in 1987. Those who did not obtain such care may represent an opportunity for increasing horse-owner demand. Therefore, one marketing goal could be to promote the benefits of annual equine veterinary care.

Other sources for equine health care services and products

Horse owners were asked where else they went for "professional health care services, advice, special diets, or medications." Fifty-two percent of horse owners identified feed or farm stores as sources. This percentage reflects the fact that feed and farm stores supply equine dietary management products that may not be available from equine veterinary practices. Farriers were identified by 20% and stables/trainers by 12%. Pet stores were identified by 14%, and this may be because most horse owners had a dog or cat. Breeders were identified by 4%. Thirty-two percent did not use an alternative source. The total exceeded 100% because some horse owners used more than one source.

The basis for the selection of source(s) is not clear, but horse owners may turn to nonveterinary sources more for professional products rather than professional health care services. Equine dietary products and a variety of equine medications are available from these alternative sources, and this might explain why a high percentage of horse owners turn to them.

These sources may represent a competitive challenge to equine practitioners. To that extent, another marketing goal could be to promote the relative advantages of consulting equine practitioners for these products and services.

1. Charles, Charles & Associates. The veterinary services market. Schaumburg, Ill; American Veterinary Medical Association, 1983.

2. Peat, Marwick, Mitchell & Co. The economic impact of the US horse industry. Washington, DC: American Horse Council, 1987.

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December 15, 1988, Volume 193, Number 12

JOURNAL

OF THE AMERICAN VETERINARY MEDICAL ASSOCIATION

Career Pathways in Veterinary Medicine
Federal service: One of the best-kept secrets around 1486

The *Human* Side of Veterinary Medicine
Talking to clients 1502

Zoonosis Update
Dysgonic fermenter-2 infections 1506

Abomasal dilatation and emptying defect in Suffolk ewes 1534

Surgical treatment of sand colic in equids: 48 cases (1978-1985) 1560

Economic Note
Employment of 1988 male and female graduates of US veterinary medical colleges 1569

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Vol 193 December 15, 1988 No. 12
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ISSN 0003-1488

Letters

Benefits of animal research 1480
More on testing for exocrine pancreatic function 1480
Satisfactory vs poor, fair, good, and excellent 1481
Caring about animals—thoughts from a student 1481
Comments on editorial 1482

Editorial

Veterinary prescription drugs—good things do happen—*J. S. Gloyd* 1483

Career Pathways in Veterinary Medicine

Federal service: One of the best-kept secrets around—*Alwynelle S. Ahl* 1486

Veterinary Services Market for Companion Animals

Pet-bird and exotic-pet owners and their use of veterinary services—*C. Michael Troutman* 1490

News

FDA Advisory Committee Characterizes Rx and OTC Drugs 1493
Peace Corps Volunteers on Road to Morocco .. 1494
Poison Hotline Now Toll Free 1495
AVMA's Congressional Fellow Enthusiastic Over Opportunities for Veterinarians in Washington 1496
AVMA Invites Applications for Congressional Fellowship 1497
Veterinary Workshop Featured at AMA Impairment Conference 1498
Deaths 1499

The *Human* Side of Veterinary Medicine

Talking to clients—*Jacob Antelyes* 1502

Zoonosis Update

Dysgonic fermenter-2 infections—*John R. August* 1506

Special Report

Comparison of the general moral reasoning of small animal veterinarians vs large animal veterinarians—*Donnie J. Self, Susan K. Safford, and George C. Shelton* 1509

Interpretive Summaries of Articles in This Issue 1514

Food Animal Economics

Rates of diseases and their associated costs in two Colorado sheep feedlots (1985–1986)—*M. D. Salman, D. A. Dargatz, C. V. Kimberling, J. S. Reif, and G. E. Hopper* ... 1518

Reports of Original Studies

Verapamil administration for acute termination of supraventricular tachycardia in dogs—*Mark Kittleson, Bruce Keene, Paul Pion, and Jerry Woodfield* 1525

Cisplatin for treatment of transitional cell and squamous cell carcinomas in dogs—*Wayne Shapiro, Barbara E. Kitchell, Theresa W. Fossum, C. Guillermo Couto, and Gordon Theilen* 1530

Clinical Reports

Abomasal dilatation and emptying defect in a flock of Suffolk ewes—*Pamela L. Ruegg, Lisle W. George, and Nancy E. East* 1534

Antemortem diagnosis of hepatic adenocarcinoma in a ewe—*J. Lofstedt, S. Schelling, J. Stowater, and E. Morris* 1537

Diagnosis and surgical correction of patent ductus venosus in a calf—*Johanna M. Reimer, William J. Donawick, Virginia B. Reef, Henry R. Wagner, and Thomas J. Divers* 1539

Surgical management of bilateral diaphragmatic paralysis in a dog—*Craig E. Greene, R. Randy Basinger, and Jeff B. Whitfield* 1542

Use of hyperthermia and radiotherapy in treatment of a large mast cell sarcoma in a dog—*Roberto A. Legorreta, David L. Denman, Mary C. Kelley, and G. C. Lewis, Jr.* 1545

Adenocarcinoma of the gland of the third eyelid in seven dogs—*Brian Wilcock and Robert Peiffer, Jr.* 1549

Unsuccessful surgical repair of a short soft palate in a dog—*Michael S. Bauer, Lyndell Levitt, John W. Pharr, J. D. Fowler, and Anthony W. P. Basher* 1551

Carpet deodorizer as a contact allergen in a dog—*Karen M. Comer* 1553

Treatment of flukes in a toucan—*Robert F. Giddings* 1555

Renal adenoma in a cat—*Walter R. Clark and Ronald B. Wilson* 1557

Reports of Retrospective Studies

Surgical treatment of sand colic in equids: 48 cases (1978–1985)—*T. E. Specht and Patrick T. Colahan* 1560

Ultrasonographic features of splenic lymphosarcoma in dogs: 12 cases (1980–1986)—*Robert H. Wrigley, Linda J. Konde, Richard D. Park, and Jack L. Lebel* 1565

Economic Note

Employment of 1988 male and female graduates of US veterinary medical colleges—*J. Karl Wise* 1569

What Is Your Diagnosis?

J. L. Carpenter and H. E. Childers 1571

Book Reviews

Field Guide to Wildlife Diseases. Volume 1. General Field Procedures and Diseases of Migratory Birds 1536

Renal Diseases in Dogs and Cats: Comparative and Clinical Aspects 1564

Abstracts of Selected Reports

Comparison of P_{O_2}, P_{CO_2}, and pH in blood collected from the femoral artery and a cut claw of cats 1548

Efficacy of morantel sustained-released bolus in control of gastrointestinal nematodes of weaned calves during the autumn-winter grazing season 1556

Prognostic index for acute abdominal crisis (colic) in horses 1559

Announcements

Coming Meetings 1573

Foreign Meetings 1576

Educational Opportunities 1577

Applications for Membership 1580

Classified Ads 1583

PUBLICATIONS DIVISION STAFF

Dr. Albert J. Koltveit, *Editor-in-Chief*
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VBPA

Veterinary Services Market for Companion Animals

Pet-bird and exotic-pet owners and their use of veterinary services

This is the 5th article in the series of synopses from the AVMA report on the veterinary services market. This article highlights major findings regarding ownership of pet birds, rabbits, and other exotic pets. Additionally, 1987 veterinary service expenditures for these animals are discussed.

Ownership statistics

Pet birds—In the survey of 29,535 households, 5.7% (1,679) owned one or more pet birds on Dec 31, 1987. Most of these households had only 1 bird, although 37% had 2 or more birds. Among bird-owning households, the mean number of birds owned was 2.5. When projected to all US households, the estimated number of pet-bird owners at the end of 1987 was 5.2 million. The projected population of birds owned was 12.9 million.

Pet-bird ownership was highest in the West, where 7.7% of households owned a pet bird. This was partly attributable to California, where almost 9% of households owned a pet bird. The percentage of pet-bird owners in the South was 5.4%. Percentages for the Northeast and North Central regions were 5.2% and 5.0%, respectively.

Demographic profiles of bird-owning households were similar to profiles of dog and cat owners. The similarities are not surprising, because a high percentage of bird owners also owned either a dog or cat. For example, 65% of bird owners owned a dog, and 47% owned a cat.

Other pet species—Survey respondents were asked whether they owned pets other than a dog, cat, or pet bird. Overall, 7.4% (2,186 of 29,535) of households surveyed indicated that they owned another pet species during 1987. On the basis of this percentage, the projected number of US households owning such pets was 6.7 million.

The top "other pet" species owned during 1987 was fish, mentioned by 2.8% of respondents (Table 1). This percentage and the estimated number of fish-owning households likely is an underestimate of the percentage of households owning fish. Some fish owners who were surveyed may not think of them as pets or companion animals; instead, they view their aquarium and fish as ornamental household items. On their questionnaire, these respondents might not have indicated fish as a pet.

Table 1—Percentage and estimated number of US households owning companion animals other than dogs, cats, and birds

Pet species	US households (%)	No. of households owning species (thousands)
Fish	2.8	2,539
Rabbit	1.7	1,495
Hamster	1.1	990
Guinea pig	0.5	486
Gerbil	0.4	360
Ferret	0.2	189
Mice and other rodents	0.4	369
Turtles	0.4	315
Other reptiles	0.3	279
Other birds	0.5	432
Livestock pets	0.4	396
All others	0.2	189

After fish, rabbits were the most frequently owned, and this was followed by several rodent species including hamsters, guinea pigs, gerbils, and mice. Another small mammal species mentioned was ferrets. As a group, rabbits, rodents, and other small mammals were owned by 4.3% of households. In comparison, turtles and other reptiles were owned by less than 1% of households. A small percentage of households identified pigeons, chickens, and ducks, as well as livestock as pets. The small percentage of exotic pets in the "all others" category included pets such as monkeys, tarantulas, and scorpions.

Households that owned pets such as fish, rabbits, and hamsters were frequently young families with children. For example, 60% of these households were headed by a parent <45 years old, with children in the home. Also, over half of those households had 2 or more children. Therefore, ownership of the other species is highly correlated with the presence of children in the home.

Use of veterinary services

Only 7.6% of bird-owning households obtained

Prepared by C. Michael Troutman, PhD, Charles, Charles Research Group, Overland Park, Kan. Last in a series of 5 synopses from the entire report, which became available Sept 15 (*see* JAVMA, Oct 1, 1988, p 765).

avian veterinary care in 1987. Among those who took their bird to a veterinarian, the average cost per visit was $29.68. Thus, the estimated 1987 veterinary expenditures of pet bird owners was $26.2 million.

Among owners of the other species, 9.9% obtained veterinary care. The average cost per visit for the other pets was $27.64 and, when projected to all US households owning them, the estimated 1987 expenditures for their veterinary care was $45.9 million.

Owners of rabbits, rodents, and ferrets were responsible for 72% of the $45.9 million, or equivalently, $33.1 million. In other words, more was spent on veterinary care for these small mammals than for pet birds. Also, small mammal owners obtained more veterinary care for their pets than did owners of fish, reptiles, or other species. For example, 15% of rabbit owners had their pet examined by a veterinarian. For ferret owners, the percentage who obtained veterinary care was particularly high (41%). As a distinct group, therefore, owners of rabbits, rodents, and ferrets are a significant market for veterinary services.

Conclusions and implications

Although pet birds, rabbits, rodents, and other exotic pets are not as common as dogs and cats, over 10 million US households own these pets. Therefore, they should represent an important market for veterinary services; however, only a small percentage of all these owners obtain annual veterinary care.

One reason is that most of these owners may not have a "regular" veterinarian. For instance, 72% of those whose only pet was a bird, rabbit, or other exotic animal did not have a veterinarian. In contrast, over 80% of dog and cat owners had a veterinarian who they would normally call when their pet needed health care.

Other findings from the survey suggest that some owners will turn to nonveterinary channels for their pet health needs. When asked where besides a veterinarian they went for "professional health care services, advice, special diets or medications," 50% of those whose only pet was a bird or exotic animal mentioned pet stores. Many of those owners may have been buying dietary management products at pet stores; however, they could also be purchasing over-the-counter medications and health care services.

These findings suggest that most pet bird and other exotic-pet owners are unaware of the benefits of routine preventive veterinary care. Therefore, one marketing goal could be to promote the benefits of annual veterinary care for pet birds, rabbits, and pet mammals.

Others who own such pets may think of pet store personnel rather than veterinarians as sources of information and advice on how to address pet health care needs. However, increasing numbers of small animal practitioners are emphasizing the availability of avian services, and this may influence more bird owners to view veterinarians as the most authoritative source for avian health care services/advice. In view of the relative significance of rabbits, rodents, and ferrets as pets, it is equally important for veterinarians to emphasize availability of services for those species.

Employment of 1988 male and female graduates of US veterinary medical colleges

On the basis of the 1988 AVMA survey of 1,472 graduates of US veterinary medical colleges, it was estimated that 75% of the graduates accepted positions as private practice employees at a mean annual salary of $23,079.[1] This report describes in detail the employment choices of 1988 male and female veterinary medical college graduates.

Type of employment

Of the 1,472 graduates responding to the 1988 AVMA survey, 49% were women and 51% were men. Table 1 shows the proportion of graduates receiving offers of employment upon graduation. Excluding graduates entering advanced study programs (graduate degrees, internships, or residencies), 78% of the women received one or more offers of employment, compared with 88% of the men, which is 2 to 3 percentage points lower than reported for 1987 graduates.[2]

Regarding graduates who had accepted employment (62%), 96% of the women and 98% of the men would work full-time, whereas 4% of the women and 2% of the men would work part-time. Of the 28 graduates indicating they would have part-time employment, 18 (64%) were women, and 10 (36%) were men. In comparison with 1987, slightly more women and slightly fewer men accepted full-time positions in 1988.

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*Table 1—Employment offers to male and female veterinary medical college graduates, 1988**

	Male (n = 667)	Female (n = 609)	Total (n = 1,276)
Received ≥ 1 offer	88%	78%	83%
Received no offers	12%	22%	17%

*Excludes graduates entering advanced study programs.

The distribution of female and male graduates was determined according to type of full-time employment (Table 2). Approximately 71% of female graduates accepting full-time employment took positions as employees in private practice, compared with 78% of male graduates. About 20% of the women, compared with 11% of the men, began advanced study programs.

Starting salaries

Graduates were asked to report their starting salary (on an annual basis) for full-time employment. Table 3 shows that the female graduate's mean starting

Table 2—Employment of male and female veterinary medical college graduates, 1988

	Male (n = 504)	Female (n = 385)
Large animal exclusive (%)	3.4	—
Large animal predominant (%)	13.1	2.3
Mixed animal (%)	17.9	10.4
Small animal predominant (%)	8.1	10.9
Small animal exclusive (%)	31.5	45.5
Equine predominant (%)	3.8	2.1
University (research or teaching; %)	2.0	2.3
Federal government (%)	—	—
Military service (%)	1.8	0.8
State/local government (%)	0.2	—
Industry/commercial business (%)	0.8	0.5
Advanced study (%)	10.7	20.5
Self-employed (%)	5.4	4.2
Other employment (%)	1.4	0.5

Table 3—Starting salary by type of practice for male and female veterinary medical college graduates, 1988

	Male	Female
Large animal exclusive	$24,488 (17)	—
Large animal predominant	$23,236 (65)	$23,055 (9)
Mixed animal	$22,802 (87)	$21,015 (36)
Small animal predominant	$22,682 (39)	$22,518 (41)
Small animal exclusive	$24,095 (153)	$23,053 (163)
Equine predominant	$21,427 (18)	$20,912 (8)
All practice types	$23,396 (379)	$22,616 (257)

Figures in parentheses = No. of graduates reporting full-time employment and starting salary.

Table 4—Fringe benefits received by male and female full-time employed graduates, 1988

	Male (n = 504)	Female (n = 385)	Total (n = 889)
Life insurance	26%	21%	24%
Medical/hospital plan	62%	62%	62%
Dental plan	11%	8%	10%
Pension plan	9%	5%	7%
Profit-sharing plan	14%	13%	13%
Disability insurance	33%	24%	29%
Liability insurance	57%	53%	55%
Association dues	46%	40%	43%
Continuing education	64%	57%	61%
Annual vacation leave	76%	74%	75%
Sick leave	40%	43%	41%
Housing/apartment	6%	5%	5%

salary as an employee in private practice was $22,616, up 2.7% from 1987. The male graduate's mean starting salary as an employee in private practice was $23,396, up 5.1% from 1987. The 1988 mean starting salary for females was $780 or 3.3% less than the 1988 mean starting salary for males.

In large animal predominant and small animal predominant practices, women and men had nearly identical mean salaries. In other types of private practice, however, men would earn higher salaries, on average, by amounts ranging from about $515 in equine practice to approximately $1,800 in mixed animal practice. The survey did not secure information on each graduate's responsibilities or hours worked in the new job; thus, it is not possible to draw conclusions from these survey data about reasons associated with varying salaries between male and female graduates.

Fringe benefits

All graduates were asked to indicate which of 12 fringe benefits would be provided by their new employer. Of male and female graduates who accepted full-time employment, the percentage receiving each of the fringe benefits is in Table 4. The percentages of men and women receiving fringe benefits were similar. Approximately 62% of women and men would be covered by a medical/hospital plan, at least 74% of women and men would receive annual vacation leave, 57% of women and 64% of men would have employer-paid continuing education expenses, and 53% of women and 57% of men would have employer-provided liability insurance.

Characteristics of graduates

Responding graduates provided information on personal characteristics such as age, marital status, and number of children (Table 5). The mean age of females and males was 27 years. Regarding marital status, 67% of female graduates were single, 28% were married, and 5% were divorced. Of the male graduates, 56% were single, 41% were married, and 3% were divorced. About 6% of the women and 20% of the men had one or more children.

Table 5—Personal characteristics of male and female veterinary medical college graduates, 1988

	Male	Female	Total
Average age (yr)	27	27	27
Marital status			
Single (%)	56	67	61
Married (%)	41	28	35
Divorced (%)	3	5	4
Widowed (%)	—	<1	<1
Graduates with children (%)	20	6	13

References

1. Wise JK. Employment, starting salaries, and educational indebtedness of 1988 graduates of US veterinary medical colleges. *J Am Vet Med Assoc* 1988;193:1317–1318.

2. Wise JK. Employment of 1987 male and female graduates of US veterinary medical colleges. *J Am Vet Med Assoc* 1987;191:1623–1624.